



Filing ID #10024104

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Peter Heffernan
Status: Congressional Candidate
State/District: TN06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 07/8/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Capital World Bond F3 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Blackrock Total Return Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: MPHQX					
Bridge Builder Core Plus Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bridge Builder Core Plus Bond [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Bridge Builder International Equity [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Bridge Builder International Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bridge Builder Large Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bridge Builder Large Growth [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Bridge Builder Large Value [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bridge Builder Large Value [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bridge Builder Small/Mid Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bridge Builder Small/Mid Growth [MF]		\$1 - \$1,000	Capital Gains	None	None
Bridge Builder Small/Mid Value [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Brighthouse Financial, Inc. (BHF) [ST]		\$1 - \$1,000	Capital Gains	None	None
Conestoga Small Cap Institutional [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: CCALX					
DFA Emerging Markets [OT]		\$25,000,001 - \$50,000,000	Tax-Deferred		
DESCRIPTION: DFEMX					
DFA US Small Cap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: DFSVX					
Ev Income of Boston I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Goldman Fs Government I [MF]		\$1 - \$1,000	Tax-Deferred		
Goldman Fs Government I [MF]		\$1 - \$1,000	Capital Gains	\$1 - \$200	None
H&W High Yield 1 [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	None
ISHares Core US Aggregate Bond [EF]		\$15,001 - \$50,000	Tax-Deferred		
ISHares Core US Aggregate Bond [MF]		\$1,001 - \$15,000	Capital Gains	None	None
ISHares Core US Aggregate Bond [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
ISHares Core US REIT [RE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: USRT					
ISHares MSCI EAFE ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
ISHares MSCI EAFE Small Cap [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IShares Rus Mid Cap ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
IShares Russ 1000 ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
IShares Russ 2000 Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
IShares S&P 100 ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
JPMorgan US Govt MMkt Capital [GS] DESCRIPTION: OGVXX		\$15,001 - \$50,000	Tax-Deferred		
MetLife, Inc. (MET) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Metropolitan West Total Return Bond 1 [MF] DESCRIPTION: MWTIX		\$100,001 - \$250,000	Tax-Deferred		
Oppenheimer Steelpath MLP Select [MF] DESCRIPTION: OSPSX		\$15,001 - \$50,000	Tax-Deferred		
Pimco Emerging Local Bond [EF]		\$15,001 - \$50,000	Tax-Deferred		
Pimco Foreign Bond Hedged [EF]		\$1,001 - \$15,000	Tax-Deferred		
Pimco High Yield Institutional Fund [MF] DESCRIPTION: PHIYX		\$15,001 - \$50,000	Tax-Deferred		
Schroders International Multi Cap [OT] DESCRIPTION: HFYFX		\$15,001 - \$50,000	Tax-Deferred		
SPDR DJ Global Real Estate [EF]		\$1 - \$1,000	Capital Gains	None	\$201 - \$1,000
The State Lifw Insurance Company [FN] DESCRIPTION: LTC		\$50,001 - \$100,000	Tax-Deferred		
Vanguard 500 Index Fund #540 [MF] DESCRIPTION: VFIAX		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Developed Markets Index Fund [OT]		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
\$100,000					
DESCRIPTION: VTMGX					
Vanguard Extended Market Index FD #598 Admiral [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: VEXAX					
Vanguard FTSE Dev Mkts [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Vanguard FTSE Emerging Mkts [EF]		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Vanguard Growth Index Admiral [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: VIGAX					
Vanguard Inflation Protected Sec FD Admiral [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: VAIPX					
Vanguard Int-Term BD ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Large Cap [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Vanguard Small Cap [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Vanguard Value [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Vanguard Value Index Admiral #506 [MF]		\$15,001 - \$50,000	Tax-Deferred		

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Christie Lites Enterprises USA LLC	Employment	\$.00	\$68,749.97
Tennessee Department of Labor & Workforce Developement	Unemployment Compensation	\$6,050.00	\$1,100.00
Oral Facial Surgery Center	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President & Board Secretary	Bandit Lites, Inc

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Peter Heffernan , 07/8/2018